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A review of illegal, unreported
and unregulated fishing issues
and progress
in the Asia-Pacific Fishery
Commission region



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Executive summary

Illegal, unreported and unregulated (IUU) fishing constitutes a persistent and pressing problem estimated to account for up to USD 23 billion annually in the APFIC area of competence (hereafter referred to as the 'APFIC area'). The effects of IUU fishing can be severe, particularly for small-island and coastal developing states heavily dependent on fisheries, and include adverse impacts on peoples' livelihoods, food security, national economies and the environment. Countries unable to fulfil international obligations for fisheries management and governance risk incurring trade sanctions on their fisheries exports, a growing issue as export markets tighten their controls. Furthermore, IUU fishing is increasingly associated with national and transnational organized criminal activities, although the evidence remains mixed.

FAO commissioned this report two years ago to produce an independent update to an unpublished 2015 study on IUU fishing in the 'APFIC area', which was presented to the APFIC as an information paper in 2016 (FAO, 2016a). The 2015 study used a mixture of media reports, literature reviews and interviews to build a picture of hotspots of illegal fishing across the 'APFIC area'. This report builds on the previous work, incorporating additional analysis methods to predict illegal fishing in a transparent manner. Based on discussions with the APFIC Secretariat, it was decided to limit the study to the illegal component of IUU fishing. A key difference with the 2015 study is the extension of the estimation of illegal fishing from the 33 hotspots covered in the 2015 study to the entire 'APFIC area' in this study.

This report provides the following key outputs: (i) development and implementation of an agreed methodology for estimating illegal-fishing levels and progress; (ii) information from case studies in three Asia-Pacific countries; and (iii) analysis of results from the agreed method estimating the incidence of illegal fishing and implications of efforts to reduce it. The approach taken to achieve these goals included a structured online survey of fisheries officials in APFIC countries, semistructured interviews of key informants knowledgeable about illegal fishing in the APFIC region and analysis of articles on illegal fishing from public media data across the 'APFIC area'.

The methods developed and applied provide an appropriate design for a repeatable, transparent and cost-effective set of approaches for estimating illegal fishing in the 'APFIC area', including responses to illegal fishing and changes since 2015. These methods align with the draft design guidelines under development by FAO for estimating IUU fishing and improve on the methods developed in the 2015 APFIC study (FAO, 2016a). The hotspot case studies from the Asia-Pacific countries explore specific contexts and aspects of illegal-fishing problems in the region, while illuminating potential responses and associated recommendations.

Key findings included:

- Generally, the hotspots for illegal fishing identified in 2015 remain so, although level of activity may have changed.
- Additional hotspot areas of illegal-fishing activities included the southeast Bay of Bengal, the region at the border of Viet Nam's exclusive economic zone (EEZ) and the South China Sea, and the region between the Philippines and Indonesia in the Celebes Sea.
- Estimated illegal-fishing landings across the 'APFIC area', excluding the South China Sea, totalled 6.6 million tonnes (MT) in 2019, with a value of USD 23.3 billion.
- In both small-scale and industrial sectors, encroachment and breach of licence conditions were the most common infractions; followed by non-compliant gear, illegal transshipment and other premeditated activities.
- Surveys suggested that illegal landings generally comprised less than half of the total landings across the 25 species evaluated in this study.

- Species, sectors and entities varied significantly in the level of illegal fishing associated with them, with some predictable patterns. For instance, illegal shark catch reached 50 percent or more of the total landings in some cases. The proportion of illegal catch for tunas was small; however, the combined value exceeded USD 1.6 billion.
- Illegal fishing by domestic fleets represented less than 25 percent of the total reported illegal fishing (by value), suggesting that illegal fishing was undertaken mostly by foreign vessels operating illegally.
- However, for five of the countries examined, between 50 percent and 75 percent of IUU fishing (by value) was undertaken by domestic vessels, and for another four countries, illegal-fishing activities were fully undertaken by the domestic fleets.
- The median value of the catch from an IUU trip was relatively small. Reported incidents with values exceeding USD 1 million were seen in only eight locations, with the maximum incident having an estimated value of around USD 14.3 million.

Based on the data sources examined and the analysis, six issues were identified that were linked to illegal fishing. These issues were: 1) high levels of illegal fishing near borders, in shared zones and disputed waters; 2) frequent violation of bilateral agreements, particularly in the case of asymmetry between parties; 3) the prominence of fish buyers or purchasers in illegal fishing; 4) the likelihood that many of the violations documented were related to stock depletion and profitability; 5) the lack of alignment in regulatory systems and industry structure as a key factor leading to illegal fishing; and 6) the role of international management regimes in reducing illegal fishing.

Nine recommendations were made that the Commission and its member states might consider, which could support efforts to reduce illegal fishing in the region. They were:

1. Continued focus by APFIC and its members on illegal fishing in the region.
2. Establishment of a transparent, repeatable and cost-effective approach to benchmarking illegal fishing and the effects of interventions in the region.
3. Development of guidance for countries in legal and regulatory reform, particularly addressing structural alignment between industry and regulation.
4. Capacity development for enforcement agencies aimed at increasing knowledge of fisheries regulations and embedding the view that violations of fishery law merit action.
5. Information sharing to support cost-effective technological innovation in monitoring and surveillance by members.
6. Development of a platform for the sharing of monitoring information near borders that facilitates cooperation and reduces barriers to information sharing.
7. Focused effort to increase monitoring, surveillance and enforcement activities aimed at fish buyers.
8. Efforts to support members in addressing stock depletion and profitability of their fishing industries.
9. Highlighting the role of norms and other informal structures in increasing regulatory compliance.

Overall, the study validated many of the findings of the 2015 APFIC study, including underlying drivers, many of the areas of high illegal-fishing activity, and the key species and gears involved. The hotspots identified in 2015 appear to remain areas of concern today. This study differed from the 2015 study in the volume and value of illegal activity. This difference is likely to be largely due to an extension of the area of coverage from the 33 hotspots evaluated in 2015 to the entire 'APFIC area' in the current study.

Two key recommendations emerging from the 2015 study, which were not highlighted based on the current study results, but which remain relevant are: 1) the value of a risk assessment study to identify areas with relatively high levels of illegality which could be usefully addressed incorporating the risks related to corruption; 2) the importance of training officials involved in IUU-related activities on fisheries regulations in their jurisdictions, juxtaposed by investigative techniques and procedures for handling evidence.

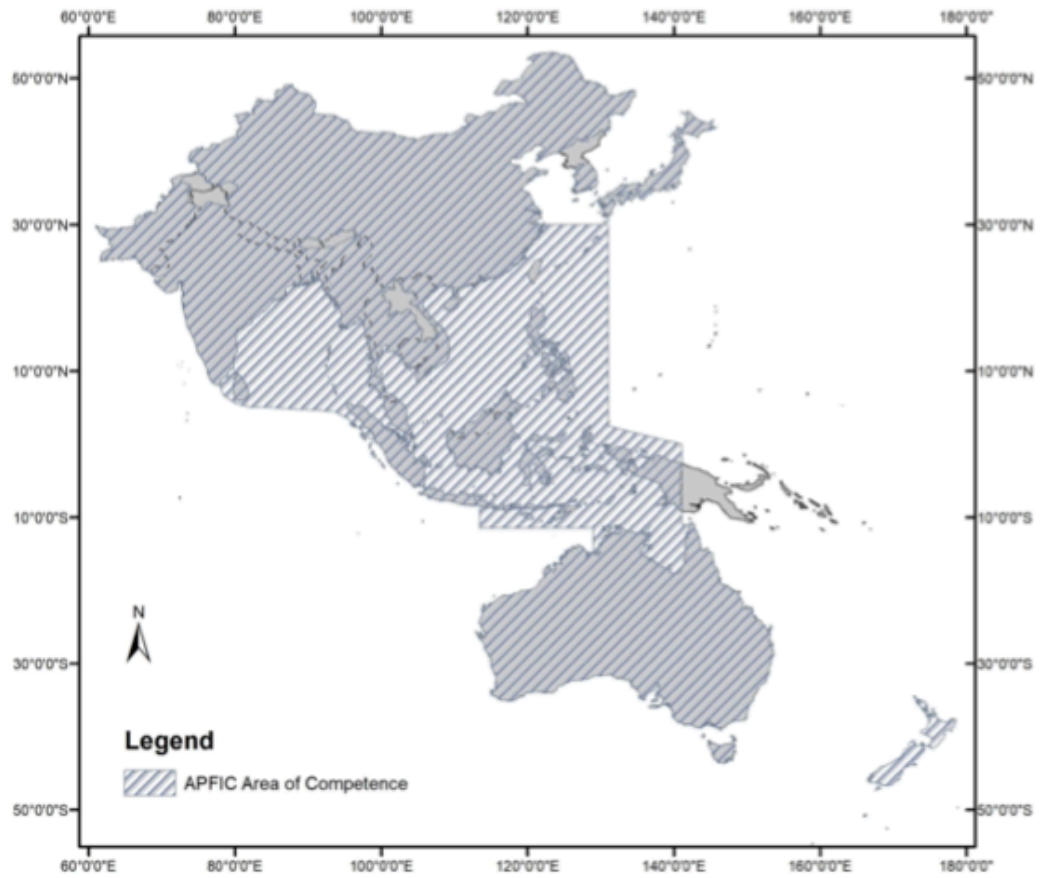


Figure 1.1. APFIC area of competence

Source: Redrawn from FAO (2020) – *Summary of regional fisheries bodies*. Available at <http://www.fao.org/fishery/rfb/apfic/en>. Conforms to Map No. 4170 Rev. 18.1 UNITED NATIONS (February 2020).

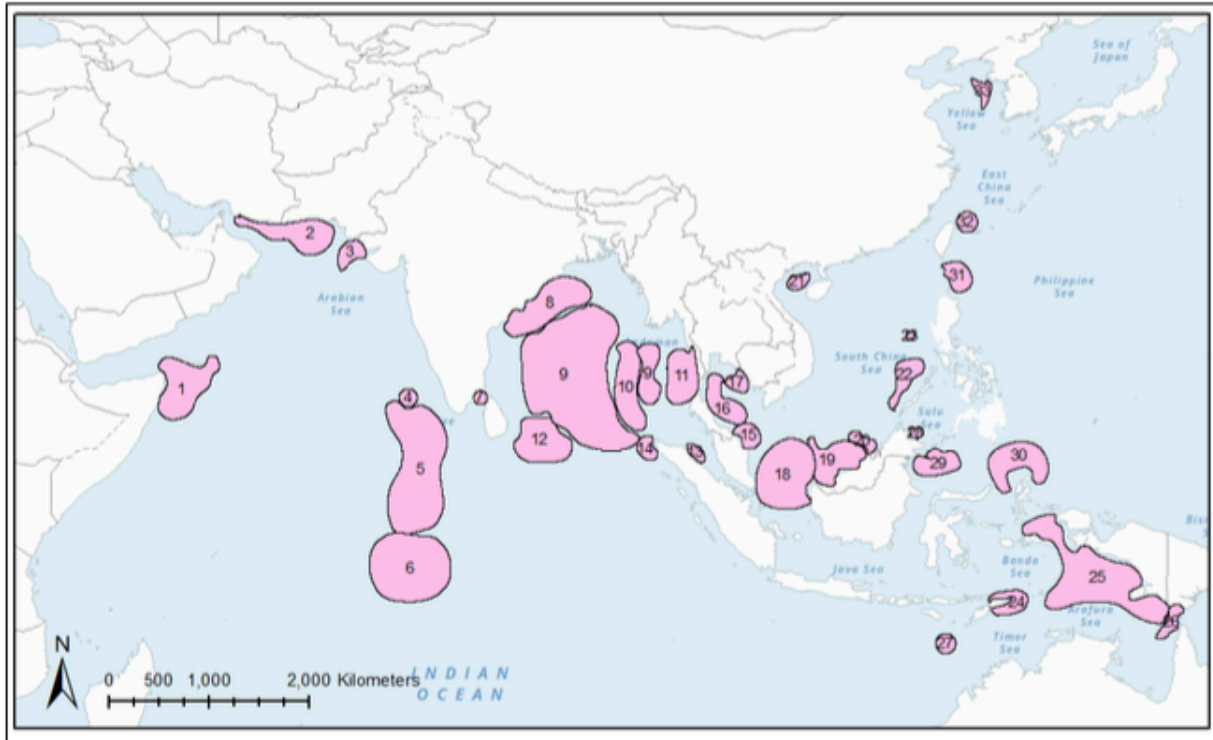


Figure 1.2. IUU-fishing hotspots in the Asian region identified in 2015

Note: Numbering is identified in Table 2.5.

Source: FAO (2016a).

The complete document is at https://www.dropbox.com/s/xwe5xktu1wjta7u/21-03-11cAPFIC_CSIRO%20Final%20Report.pdf?dl=0